

We have created some New Features to make electronic submission easier.

EASIER to USE BLINE – Commission Capture functionality

Why did we make this change?

- o Complexity of products / profiles is a disincentive to usage
- Profiles too many, too complex, too confusing
- o There was a lot of re-work, in correct paper work and needless follow up

No more commission profiles. You can the chooses desired initial, renewal and trail commission and plan terms are played back for you to confirm. It is also sensitive to allocation bands.

What products are the new commission capture screens available on?

- Savings
- o Investments
- Pensions (excluding PTA)

Commission profiles can now be filtered by:

- o Age
- o Term
- Premium

Let's get started!

This guide will bring you step by step through the new commission capture screens on epos. We will use two examples.

Example 1 How commission capture works

Complete solutions - Company 1 plan

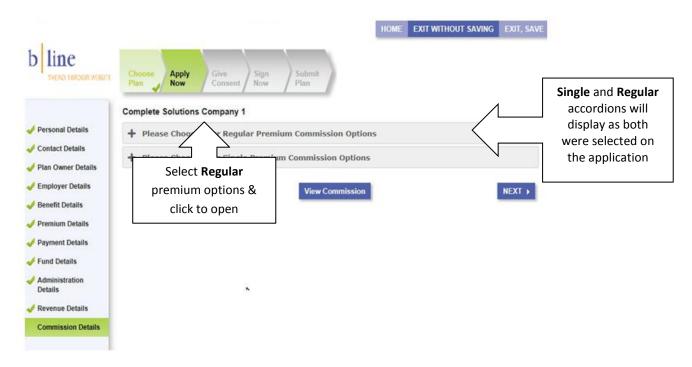
While completing an application with a customer you have now reached the Commission details section in the process.



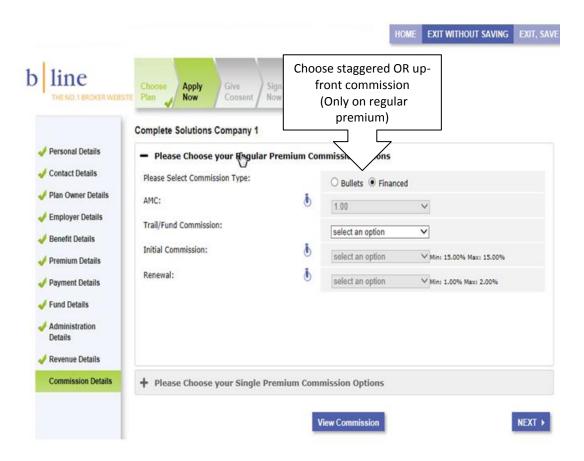


Regular Premium Commission Options

Step 1 Getting started

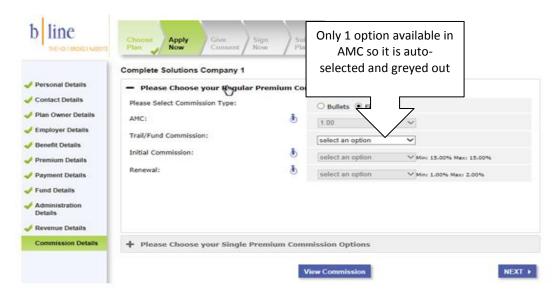


Step 2 Select Values in order to choose a final commission option

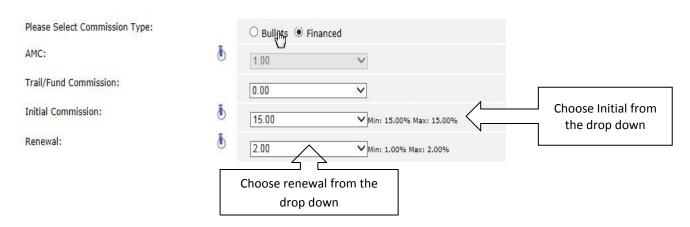




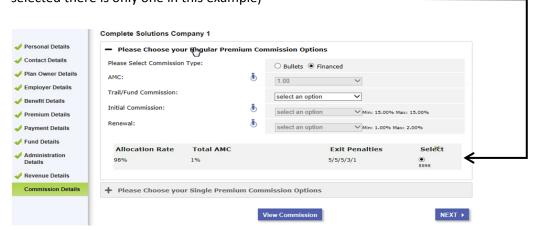
Scenario 1 - Up Front Commission Selected



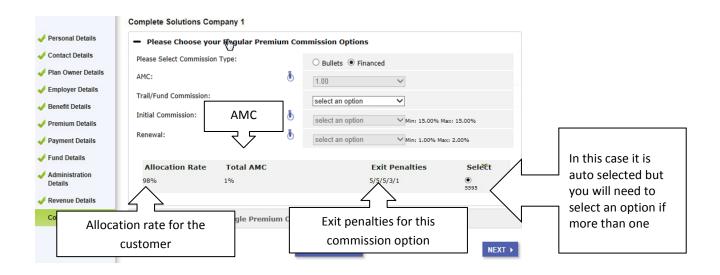
You can choose trail commission from the drop down



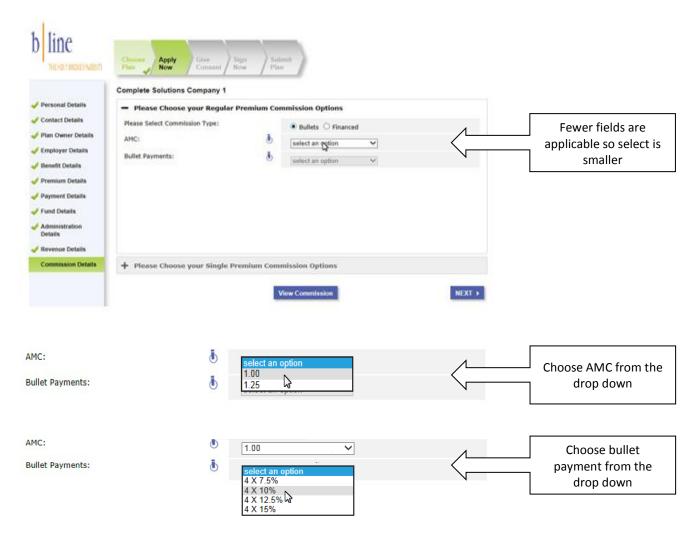
Once the fields are selected. A list of available commission options appears (based on what was selected there is only one in this example)





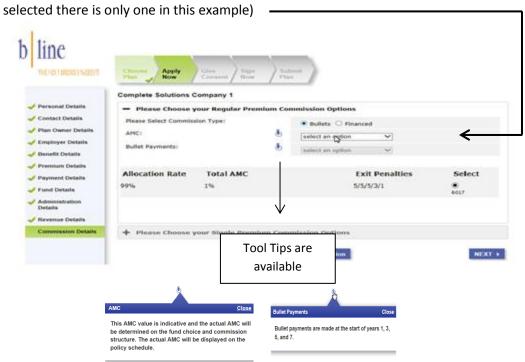


Scenario 2 - Bullets Selected





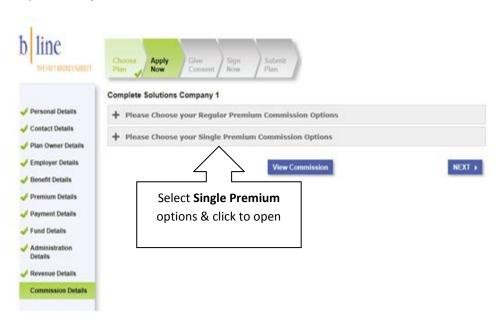
Once the fields are selected. A list of available commission options appears (based on what was



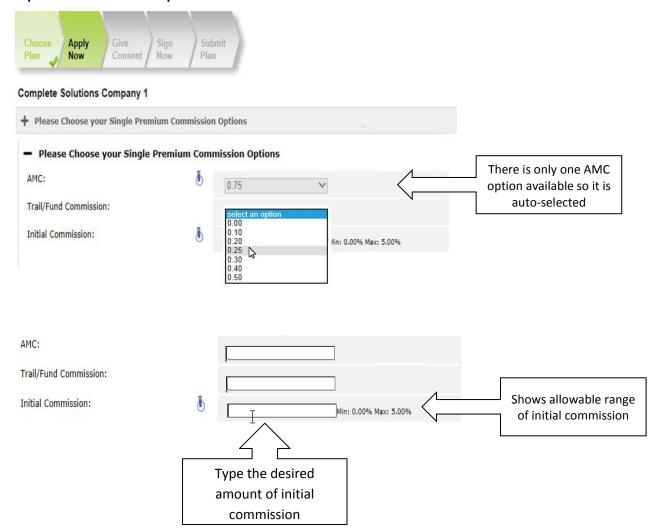


Single Premium Commission Options

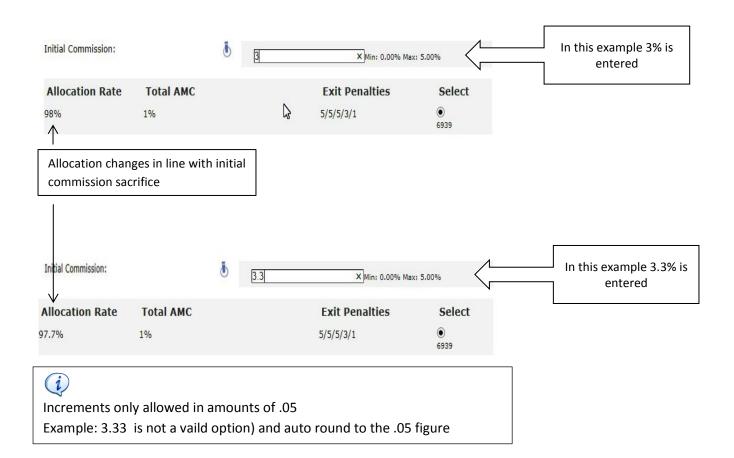
Step 1 Getting started



Step 2 Select from the drop down list to see what is available.





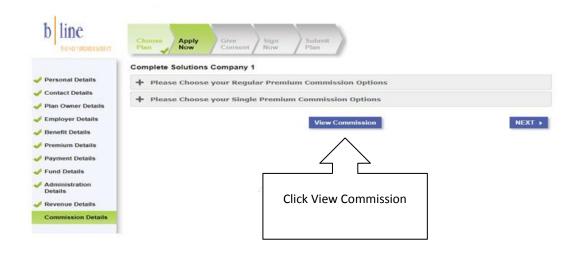


Final Step

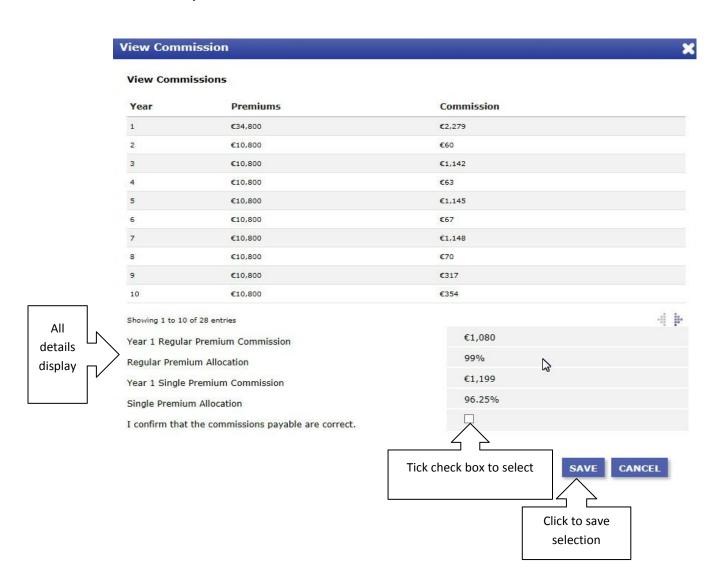




View commission profile and selected



View Commission Report





Complete the application

